

# Match Client

Last Updated: 05/16/2018

## Overview

This job aid describes how to complete the match client process of a submitted application. Caseworkers will be given different drop-down values to select based on the applicant data provided.

When Registered status is *No*, the drop-down option enabled from the **List Actions Menu** will differ depending on whether the Date of Birth (DOB) or Gender are provided on the prospect person.

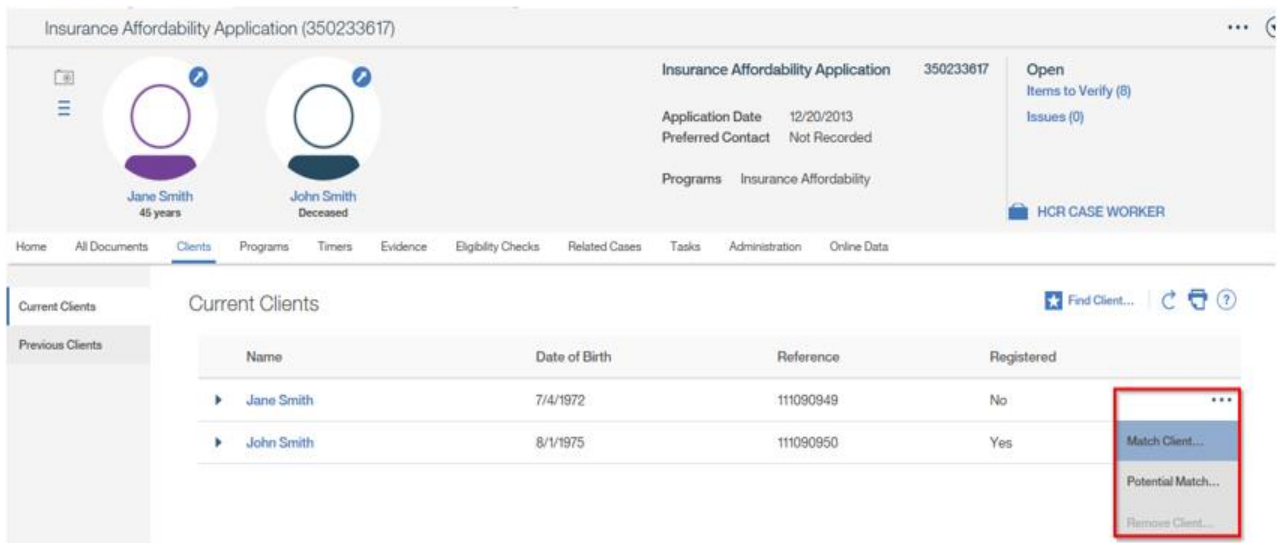
Option 1: If either the DOB or gender are blank, the **Match Client** option will be selectable from the drop-down menu.

Option 2: If either the DOB or gender are not blank, the **Potential Match** option will be selectable from the drop-down menu.

## Step-by-Step Instructions

### DOB or Gender are blank- Match Client:

1. Click the applicable **List Actions Menu** then select **Match Client**.



The screenshot displays the 'Insurance Affordability Application (350233617)' interface. At the top, there are two client profiles: Jane Smith (45 years) and John Smith (Deceased). Below them is a navigation bar with tabs: Home, All Documents, Clients, Programs, Timers, Evidence, Eligibility Checks, Related Cases, Tasks, Administration, and Online Data. The 'Clients' tab is active, showing a table of 'Current Clients'.

Name	Date of Birth	Reference	Registered
Jane Smith	7/4/1972	111090949	No
John Smith	8/1/1975	111090950	Yes

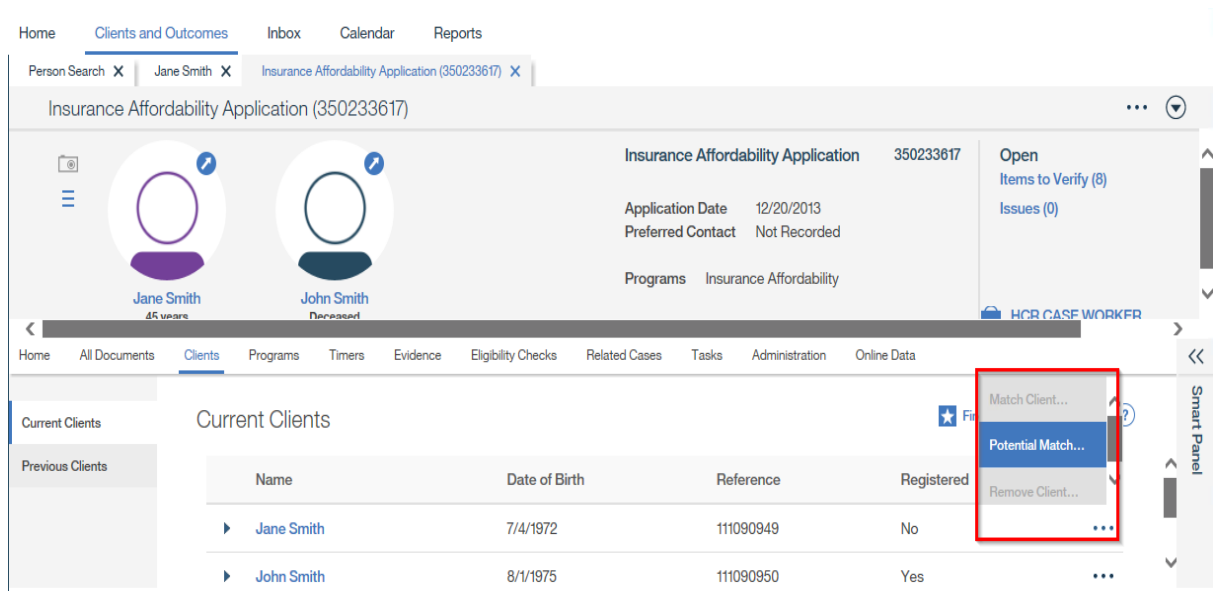
For Jane Smith, a dropdown menu is open, showing the following options: Match Client..., Potential Match..., and Remove Client... The 'Match Client...' option is highlighted.

- The Match Client pop-up appears. Enter the applicable search criteria then click **Search**.

**Note:** First search using the SSN (if applicable). If no result is found, search by name, DOB and gender to ensure they are not already registered in the system.

## DOB or Gender are not blank- Potential Match:

- Click the **List Actions Menu** next to the client then select **Potential Match** from the drop-down menu.



The screenshot shows the NC FAST application interface. At the top, there are tabs for Home, Clients and Outcomes, Inbox, Calendar, and Reports. Below these, there's a search bar with 'Jane Smith' and 'Insurance Affordability Application (350233617)'. The main content area displays 'Insurance Affordability Application (350233617)' with details like Application Date (12/20/2013), Preferred Contact (Not Recorded), and Programs (Insurance Affordability). Below this, there's a table of 'Current Clients' with columns: Name, Date of Birth, Reference, and Registered. The table lists Jane Smith (7/4/1972, 111090949, No) and John Smith (8/1/1975, 111090950, Yes). A 'List Actions Menu' is open for Jane Smith, showing options: Match Client..., Potential Match..., and Remove Client... The 'Potential Match...' option is highlighted with a red box.

Name	Date of Birth	Reference	Registered
Jane Smith	7/4/1972	111090949	No
John Smith	8/1/1975	111090950	Yes

- The Potential Match pop-up appears. Select the applicable **radio button** then click **Save**. If the potential matches listed in the modal are not the same person, click **Find Match** and follow the steps for Match Client above.

### Notes:

- Selecting the potential match will pull that person and their information into the application; marking the prior or incoming person as a duplicate of the selected person.
- The Match Criteria column will display what information is a match regarding: first name, last name, gender, date of birth or social security number.

Potential Match

Prospect Person Information

Full Name

Jane Smith

Gender

Female

Address Line 1

Address Line 2

123 Main St

City

Raleigh

State

NC

Date of Birth

7/4/1972

Birth Last Name

SSN

Zip Code

27612

Search Results

Person	Source	Address	Date of Birth	Gender	Match Criteria
<div>▶</div> <div>○</div> <div>Jane Smith</div>	NCFast	123 Main St, Raleigh, North Carolina, 27612	7/4/1972	Female	FN, LN, DOB and Gender

Cancel

Find Match...

Save

**Note:** When multiple search results are returned, click the toggle next to the client's name. Person details will display and the user can verify that the SSN and/or CNDS number are correct before continuing in the Match Client process.

No Search Results	Source CNDS	Source NC FAST
NC FAST will automatically register the client in the system.	If the CNDS source is found and verified by the user: <ol style="list-style-type: none"> <li>Select the applicable <b>radio button</b> then click <b>Next</b>.</li> <li>Click <b>Find Match</b>.</li> <li>Click <b>New Person</b>.</li> <li>The Register Person wizard appears. Complete all mandatory fields marked by an asterisk (*)</li> </ol>	If the NC FAST source is found and verified by the user: <ol style="list-style-type: none"> <li>Select the applicable <b>radio button</b> then click <b>Save</b>.</li> <li>The Current Clients screen displays, showing the client's registered status changed to Yes.</li> </ol>



	<p><b>Note:</b> If a number auto populates in the reference field, do not delete the number. Click <b>Next</b>.</p> <p>e. Validate the primary address then click <b>Next</b>.</p> <p>f. Validate the Mailing Address then click <b>Finish</b>. The Current Clients page displays, showing the client's registered status changed to Yes.</p>	
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